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**TO: Economic Support Supervisors
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Training Staff
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W-2 Agencies
Workforce Development Boards**

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BHCE/BWP OPERATIONS MEMO

No.: 03-79

Date: 12/29/2003

Non W-2 ☒ W-2 ☒ CC ☐

PRIORITY: HIGH

SUBJECT: WORKFORCE ATTACHMENT AND ADVANCEMENT (WAA) PROGRAM

EFFECTIVE DATE: January 1, 2004

PURPOSE

The purpose of this memo is to provide direction on the ending of the WAA program and its impact on WAA participants.

BACKGROUND

The Workforce Attachment and Advancement (WAA) Program was created in 1999. Funding for the program was provided in the 1999-2001 and 2001-2003 biennial budgets. No new funding for the 2003-2005 biennium was provided in 2003 Wisconsin Act 33, the biennial budget act.

Current WAA contracts run through December 31, 2003. Wisconsin Works (W-2) agencies and Workforce Development Boards (WDBs) can continue to serve WAA participants and incur expenses through December 31, 2003.

POLICY

With the WAA program ending, W-2 agencies and WDBs should take appropriate steps to close WAA participation in CARES. For those individuals who are co-enrolled in WAA and another work program, i.e., Wisconsin Works (W-2), Children First, Food Stamp Employment

and Training (FSET), Welfare to Work or Workforce Investment Act (WIA), only the WAA program should be closed in CARES

NOTE ➤ If individuals are co-enrolled in WIA, WDBs should close out WAA services reported in ASSET).

The following CARES instructions provide a step-by-step process by which WAA individuals can be closed out of CARES.

CARES INSTRUCTIONS

Local agencies are responsible for completing all CARES reporting for services provided in WAA, as well as closing out all WAA program records. These records must be closed out as of December 31 or earlier, although backdated reporting in CARES can be done through January. In summary this includes:

- Cease referral of new WAA cases in CARES. The WA type of RFA will be discontinued in CARES effective December 31.
- Retrieve listing of open WAA cases using WPFN - these will all have to be closed in WAA in CARES.
- Complete all WAA activities on WPCS.
- Complete information on WPWA
- Complete WAA program participation on WPWI.
- Complete disenrollment on WPDS if the individual is only open in WAA.

NOTE ➤ If it is necessary to back-date the dates on closing out a WAA activity on WPCS or entering the WAA completion date on WPWI, workers will have the ability to do that. The latest date that should be used in back-dating is 12-31-2003, to coincide with the WAA program closure date. Workers must complete closing out WAA individuals by the end of January 2004. This will ensure that all WAA activity is reported prior to the production of the final 2003 year-end reports.

The following detailed instructions will explain how to complete the above steps.

IDENTIFY OPEN WAA CASES

WAA Workers will first need to identify their caseload of WAA individuals. This can be accomplished by using the search screen WPFN.

On WPFN, a worker should enter the WP office number(s) in which WAA individuals might be open. WAA individuals could be open in one of two WP offices in a given county, the W2 WP office, which begins with either a "0" or "1", or the FSET office which begins with a "2". Workers should check both WP office types in searching for WAA individuals. One way to search both offices at once is to use the county number rather than a specific office number. It may be helpful to search for counts in each office initially. Also plan on searching WPFN several times to catch any updates or additions that occur after the batch date of the WPFN data (See UPDATED ON Date on WPFN).

The exception to this rule is Milwaukee County, which is divided into six regions. Workers in Milwaukee should search by the office number associated with their region. For instance, workers in Region 1 should search office 1571 (the W2 WP office for region 1) and office 2571 (the FSET WP office for region 1.)

Below is an example of searching for WAA individuals using the W2 WP office number for region 1 in Milwaukee. This sample search uses a case manager ID xct266 to narrow the search to a particular work programs case manager's portion of the caseload. An "O" for "open" must be placed next to the WA IND field to pull up open WAA individuals:

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WPFN                                REQUEST TO "FIND" INFORMATION                12/16/03 11:27
                                (FIXED "AND" SEARCH CRITERIA)            XCT266 K CLOUGH
SPECIFY THE TYPE TO BE LISTED BASED ON ANY OF THE FOLLOWING:-
STATE/COUNTY:  _ OFFICE: 1571 WDA:  _ PROGRAM:  _ WP REG:  _ IM REG:  _
CASE MGR ID: XCT266 ESS:  _ ZIP:  _ REG NO:  _ CENSUS:  _
LANG CD:  _ EDU:  _ REFERRAL DATE:  _ THRU  _ SUB PGM:  _
EARNED INCOME:  _ DATE OF BIRTH:  _ THRU  _ SEX:  _
VEHICLE AVAILABLE:  _ D.L:  _ TYPE:  _ DISABILITY:  _ JRI:  _ E/SC COD:  _
OPEN EP:  _ RFGE:  _ VTRN:  _ TRBL MBR:  _ W2 SLOT:  _ ABAWD:  _ GRAD STS:  _
LF STATUS:  _ LAST CONTACT:  _ THRU  _ SYS STAT:  _
CF:  _ 2PAR:  _ HISP/LAT:  _ AMR IN/AK:  _ ASIAN:  _ BLK:  _ HI/PAC:  _ WHITE:  _
**WT SPECIFIC WT IND:  _ TGT POP:  _ WT TYPE INDIV:  _ RECIP 30:  _
*WT PGM TYPE:  _ STAND ALONE TR:  _ PRS CONT:  _
WA IND: O WA PGM TRK:  _ WA TYPE INDIV:  _
COMPONENT CD:  _ COMPONENT BEGIN DATE:  _ THRU  _
PHASE:  _ DOT:  _ COMPONENT ANT END DATE:  _ THRU  _
STAFF ID:  _ PROV ID:  _ FUND SRCE:  _ SCH HOURS:  _ THRU  _
EMP PROV ID:  _ SITE ID:  _ DISP CD:  _ ACT CD:  _
-----
DO YOU WANT TO INCLUDE "OR" SEARCH CRITERIA ? : N
Total Individuals meeting the Search criteria : 30
PF14 WPML
NEXT TRAN:  _ PARS:  _

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Once a match is made on WPFN, workers can press PF14 to access WPML, which provides a listing of the individuals meeting the search criteria. An example of WPML is shown below:

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WPML                                MATCHED LISTING                12/16/03 11:43
                                XCT266 K CLOUGH
TOTAL INDIVIDUALS MATCHING THE SEARCH CRITERIA: 30
OFFICE: 1571

CO OFF CASE LAST NAME PIN SSN REG SUB
MGR ID PGM
_ 40 1571 XCT266 COOPER G 91005xxxxx 336 xx xxxx V
_ 40 1571 XCT266 HARRISON H 01004xxxxx 557 xx xxxx V
_ 40 1571 XCT266 IDS W 71005xxxxx 331 xx xxxx M
_ 40 1571 XCT266 JANSEN K 01004xxxxx 369 xx xxxx V
_ 40 1571 XCT266 LESTER M 71005xxxxx 887 xx xxxx V
_ 40 1571 XCT266 PEARLMAN L 51005xxxxx 667 xx xxxx V
_ 40 1571 XCT266 SMALLS L 81004xxxxx 544 xx xxxx V
_ 40 1571 XCT266 SPANTEST H 11005xxxxx 367 xx xxxx M
_ 40 1571 XCT266 YATES J 91005xxxxx 887 xx xxxx V
_ 40 1571 XCT266 TESTAGAIN H 91005xxxxx 455 xx xxxx M
_ 40 1571 XCT266 BRADY K 31004xxxxx 447 xx xxxx V

PF13 WPFN UPDATED ON: 12 12 03 PAGE: 0001 OF 0003
NEXT TRAN:  _ PARS:  _ MORE...

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Once the population of WAA individuals has been identified for a specific office and worker, workers are now ready to close them out on a one-by-one basis. Keep in mind that there may be cases assigned to other workers, maybe ones no longer in the agency. All WAA cases must be closed, regardless of the worker assignment.

COMPLETE ACTIVITY REPORTING ON WPCS/WPCH

The first step of this process is to check to see if there are any WAA specific components open for the individual on screen WPCH. A WAA specific component is one that is funded entirely by the WAA program and should have the WAFL fund source code listed as the component's fund source.

Workers should be careful not to close out a component that might be shared by the WAA program and another program, such as W2 or FSET. Doing so could affect the other program's performance measures. Shared activities must be discussed locally among the programs to determine if they will continue without WAA funding. CARES should be updated to reflect any necessary changes.

Those components identified as being WAA only should be closed out prior to completing the WAA episode. Closing a component on WPCH requires placing a C in the field above the component and hitting ENTER, as shown below:

WPCH		COMPONENT/STATUS HISTORY		12/17/03 14:58	
PIN: 6100512483		REGION: 0005		OFFICE: 1575	
NAME: WTWREG		TEST		COUNTY/TRIBAL UNIT: 40	
				CASE MANAGER: XCT266	
TYPE OF ACTION:		C			
OFFICE/REGION:	1575 0005	1575 0005	1571 0001		
COMPONENT/STATUS:	EMP SEARCH	ENR W/ORIENT	ENR W/ORIENT		
PHASE/SANC IND:	A N	A	A		
BEGIN DATE:	12 17 03	12 17 03	11 01 01		
STAFF/PROVIDER ID:	XCT266 0001	XCT266 0001	XCT266 0001		
SCH HRS: WKY/DLY:	20 04				
FREQ: DAYS PER MM:	20				
FUNDING SOURCE:	WAFL				
EMP PRV ID:					
SITE ID/DOT:					
NON-APPROVAL CD:					
ANTIC END DATE:	12 31 03				
COMPLETION CODE:					
ACTUAL END DATE:		12 17 03	11 01 01		
				PAGE: 1	
NEXT TRAN: _____		PARMS: 6100512483_____			

This will return the WPCS screen. The worker should enter the appropriate component end date, using a date not greater than 12-31-2003, and enter an appropriate component completion code. If the reason the component is ending is due the sun-setting of the WAA program, we recommend using the completion code "B", which will indicate the component was "Interrupted". If, however, the component ended for another reason, then use the appropriate code. An example of ending a component with "B" is shown below:

WPSC	CREATE/UPDATE COMPONENT/STATUS	12/17/03 15:00
		XCTA28 K CLOUGH
PIN: 6100512483	REGION: 0005	OFFICE: 1575
NAME: WTWREG	TEST	COUNTY/TRIBAL UNIT: 40
TYPE OF ACTION: C (A-ADD U-UPDATE C-COMplete D-DELETE)		
COMPONENT/STATUS: ES EMP SEARCH		
PHASE: A (P-PENDING S-SCHEDULED A-ACTUAL)		
BEGIN DATE: 12 17 2003		
STAFF ID: XCT266		
PROVIDER ID: 0001		
WEEKLY SCHEDULED HOURS: 20	W-2 SANC IND (Y/N): N	
DAILY SCHEDULED HOURS: 04	FREQUENCY (DAYS PER MONTH): 20	
FUNDING SOURCE: WAFL__		
EMPLOYER PROVIDER ID: _____		
SITE ID: _____		
DOT: _____		
NON-APPROVAL CODE: _____		
ANTICIPATED END DATE: 12 31 2003		
COMPLETION CODE: B		
ACTUAL END DATE: 12 17 2003		
PF13 WPSC	PF14 POST ANOTHER COMPONENT	
NEXT TRAN: _____	PARMS: 6100512483	_____

Once the Completion code and Actual End Date have been entered, press ENTER and the component will be closed.

COMPLETE PROGRAM INFORMATION ON WPWA

The screen that is used to post the actual Program Completion from WAA is WPWI. But before a WAA individual can be completed on WPWI, the WAA worker must complete some information on screen WPWA.

On WPWA, the worker must indicate whether the WAA individual is employed at exit and if so, how much income the individual is making from the employment.

These two fields are highlighted below:

WPWA	UPDATE WP-WA CLIENT INFORMATION	12/17/03 15:01
		XCTA28 K CLOUGH
PIN: 6100512483	SSN: 887 12 0252	WDA: 2 CTY/TRIBE: 40 OFFICE: 1575
NAME: TEST	WTWREG	
CURRENT DETERMINATION	X CUSTODIAL PARENT	NON CUSTODIAL PARENT
PARTICIPATION BEG DT: 09 13 2002	WAA PGM REVIEW DUE DT: 09 13 2003	
	REVIEW COMPLETION DT: __ __ __	
CUSTODIAL PARENT:		
FAMILY SIZE: 01 # ADULTS 01 # CHILDREN		
NON CUSTODIAL PARENT:		
TOTAL INCOME AMT(MTHLY): _____		PATERNITY VERIF: _
		CHILD SUPPORT PAID AMT(MTHLY): _____
#	CHILDREN NAME	SSN DOB PTRNTY? CTY
1	_____	_____
2	_____	_____
3	_____	_____
WAA WORKER: XCT266		
INCOME VERIF AT REVIEW: _		PROGRAM TRACK: 1
EMPLOYED AT EXIT: Y		INCOME ELIGIBILITY AMT(MTHLY) : _____
EXIT EARNED INCOME AMT(MTHLY): 500.00		ENTRY EARNED INCOME AMT(MTHLY): .00
WAA APP SIGNATURE DT: 09 13 2002		
PF13 WPED	PF14 WPJR	PF15 WPC PF22 WPWI
NEXT TRAN: _____	PARMS: 6100512483	_____

COMPLETE PROGRAM PARTICIPATION ON WPWI

Once this information is entered, the worker can return to WPWI to enter the actual Completion code and completion date.

The worker should carefully check over screen WPWI to check the co-enrollment status of the individual. It is possible for the individual to be open in more than one program and this information can be gleaned from WPWI. For example, the individual could be open in any of the following programs along with WAA:

- Wisconsin Works (W2) Program
- Welfare to Work (WtW)
- Children First (CF)
- Food Stamps Employment and Training Program (FSET)

By carefully checking WPWI the worker can make the appropriate determinations.

If the individual is open in WAA and W2, WPWI should look like the following:

WPWI	UPDATE WP CLIENT INFORMATION - 1		12/16/03 13:23
			XCT266 K CLOUGH
PIN: 3100647416			
SSN: 512 20 3156	WDA: 02	CTY/TRIBE: 40	OFFICE: 1575 NEW OFFICE: ____
NAME: BSTALERT	PALCED-100503		
ADDRESS: 101	MAIN	ST	
CITY: MILWAUKEE	STATE: WI	ZIP: 53701	MAILING ADDRESS ON WPWC: N
PRIMARY PHONE:		MESSAGE PHONE: ____	
PRIMARY WAGE EARNER: N		HEAD OF HOUSEHOLD: Y DOB: 08 17 1974	
CASE: 3700314337 CAT: WW C SEQ: 01		CF RFA: CF RFA DATE:	
REGION NUM: 05		WT RFA: WT RFA DATE:	
LF STATUS:	ABAWD: N	WA RFA: 2700316827 WA RFA DATE: 12 16	
CF: FROM:	CTY:	CF COMP CD: ____	CF COMP EFF DT: ____
WT: FROM:		WT COMP CD: ____	WT COMP EFF DT: ____
WA: O FROM: 11 01 2003		WA COMP CD: ____	WA COMP EFF DT: ____
CASE MGR: XCT266	*WP REG CD: M	SYST STS: E	FEP ID: XCT266
ES WKR: XCT266	IM REG: N	IM REG EFF: 12 16 2003	
*EFF DT: ____	DT OF LAST CON: 11 01 2003	E/SC:	W2 PLACE: W2T
2PAR: NO DESC: NOT A 2-PARENT HOUSEHOLD			
PF13 WPED	PF14 WPJR	PF15 WPWC	PF22 ACWI
NEXT TRAN: ____	PARMS: 3100647416		

Notice here that there is a case number listed in the CASE field and that the CAT is WW C. Also, there is W2 placement information listed here, in the example above the placement is for W2T.

If the individual were open in WAA and FSET, WPWI would look like the following:

WPWI	UPDATE WP CLIENT INFORMATION - 1		12/16/03 13:30
			XCT266 K CLOUGH
PIN: 810065xxxx			
SSN: 351 xx xxxx	WDA: 02	CTY/TRIBE: 40	OFFICE: 2571 NEW OFFICE: _____
NAME: SHARON	WAA		
ADDRESS: 1111	JACKSON ST		
CITY: MADISON	STATE: WI	ZIP: 53703	MAILING ADDRESS ON WPWC: N
PRIMARY PHONE:		MESSAGE PHONE: _____	
PRIMARY WAGE EARNER: N		HEAD OF HOUSEHOLD: Y DOB: 01 01 1960	
CASE: 8700316580	CAT: FS	SEQ: 01	CF RFA: _____ CF RFA DATE: _____
REGION NUM: 01			WT RFA: _____ WT RFA DATE: _____
LF STATUS:	ABAWD: N	WA RFA: 4700316845	WA RFA DATE: 12 16 03
CF: FROM:	CTY:	CF COMP CD: _____	CF COMP EFF DT: _____
WT: FROM:		WT COMP CD: _____	WT COMP EFF DT: _____
WA: O FROM: 11 02 2003		WA COMP CD: _____	WA COMP EFF DT: _____
CASE MGR: XCT266	*WP REG CD: M	SYST STS: E	FEP ID: _____
ES WKR: XCT061	IM REG: M		IM REG EFF: 12 16 2003
*EFF DT: _____	DT OF LAST CON: 12 15 2003	E/SC: _____	W2 PLACE: _____
	2PAR: _____	DESC: _____	
PF13 WPED	PF14 WPJR	PF15 WPWC	PF22 ACWI
NEXT TRAN: _____	PARMS: 351024242_____		

Again notice that there is case number listed in the CASE field and that the CAT is FS. Also notice that the office number begins with a "2", which indicates that the individual is open in the FSET WP office.

As mentioned, the individual could also be open in either WtW and/or CF along with WAA. If the individual were open in any of these programs, there would be an "O" (for Open) next to the CF or WT field on WPWI.

Making the appropriate co-program participation determination is a very important part of the WAA closure process. If the WAA individual is in fact open in another program, it means the individual must NOT be disenrolled from Work Programs after WAA is completed on WPWI. If in fact WAA is the only program open, then the worker must disenroll the WAA individual after completing WPWI.

To complete WAA on WPWI, the worker will need to enter a completion code to indicate the WAA individual has closed due to the sun-setting of the WAA program. The code that must be used is "PA" - "Program Authorization Ended", with a Program completion date that is not greater 12-31-2003, as shown below:

WPWI	UPDATE WP CLIENT INFORMATION - 1	12/16/03 13:30 XCT266 K CLOUGH
PIN: 81006xxxxx		
SSN: 351 xx xxxxx	WDA: 02	CTY/TRIBE: 40 OFFICE: 2571 NEW OFFICE: ____
NAME: SHARON	WAA	
ADDRESS: 1111	JACKSON	ST
CITY: MADISON	STATE: WI ZIP: 53703	MAILING ADDRESS ON WPWC: N
PRIMARY PHONE:	MESSAGE PHONE: ____	
PRIMARY WAGE EARNER: N	HEAD OF HOUSEHOLD: Y	DOB: 01 01 1960
CASE: 8700316580 CAT: FS	SEQ: 01	CF RFA: CF RFA DATE:
REGION NUM: 01	WT RFA:	WT RFA DATE:
LF STATUS: ABAWD: N	WA RFA: 4700316845	WA RFA DATE: 12 16 03
CF: FROM: CTY:	CF COMP CD: ____	CF COMP EFF DT: ____
WT: FROM:	WT COMP CD: ____	WT COMP EFF DT: ____
WA: O FROM: 11 02 2003	WA COMP CD: PA	WA COMP EFF DT: 12 31 2003
CASE MGR: XCT266	*WP REG CD: M	SYST STS: E FEP ID:
ES WKR: XCT061	IM REG: N	IM REG EFF: 12 16 2003
*EFF DT: ____	DT OF LAST CON: 12 15 2003	E/SC: W2 PLACE:
	2PAR: DESC:	
PF13 WPED PF14 WPJR PF15 WPWC PF22 ACWI		
NEXT TRAN: ____	PARMS: 351024242	

DISENROLL FROM WORK PROGRAMS WHERE APPROPRIATE

Once the individual has been completed from WAA on WPWI, the worker will then determine whether the individual should be disenrolled from Work Programs. Again, this decision will be based on the co-program participation status of the individual. If the individual is open in another program as discussed above, then the individual must **NOT** be disenrolled.

If, however, the individual is not open in another program, the worker should disenroll the individual using the WPDS screen.

On WPDS, the worker will check that the Disenrollment reason is "Other" and enter a "Y" to confirm the disenrollment, as shown below:

WPDS	DISENROLLMENT	12/16/03 13:57 XCT266 K CLOUGH
PIN: 81006xxxxx		OFFICE: 2571
NAME: WAA	SHARON	COUNTY/TRIBAL UNIT: 40
DATE: 12 16 2003		
REASON: SANCTION _	OTHER Y	
CONFIRM DISENROLLMENT (Y/N)? Y		
NEXT TRAN: ____	PARMS: 351024242	

CONTACTS

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Note: Email contacts are preferred. Thank you.

DWD/DWS/BDS/DR